

What is GrowthZone?

Automated Messaging

- Configurable Automated Messages

- System automatically sends emails based on triggers
 - Let the software do the work
- More than 70 options available
- Customize emails
- Disable any messages you don't want sent out

The screenshot shows the 'Setup' page for 'Automated Messaging' in the Chambermaster Memberzone system. On the left is a dark sidebar with a 'HIDE MENU' button and a list of navigation items: Events, Reports, Communication, Lists/Committees, Cloud, Sales Funnel, Marketing Automation, Projects/Tasks, Web Content, Store, Sponsors/Ads, Forms/Surveys, Chapters, Continuing Education, Fundraising, and Setup. The main content area has a 'Setup' header and a 'Automated Messaging' sub-header. Below this is a search bar and a table with columns for 'Category', 'Reason for message', and 'Actions'. A red box highlights a dropdown menu that lists 15 categories: Billing/Finance, Certification, Event, Forms/Surveys, Forum, Fundraising, Lists/Committees, Login Create/Reset, Meeting proposal, Membership Renewal, Notifications, Projects/Tasks, SalesFunnel, and Web Content. The table contains 15 rows of message templates, such as 'Growth Zone Pay Ach Insufficient Funds' and 'Fundraising Donation Summary'. At the bottom, there is a pagination bar showing '1 - 74' and 'TOTAL: 74'.

Category	Reason for message	Actions
Billing Finance	Growth Zone Pay Ach Insufficient Funds	
Fundraising	Fundraising Donation Summary	
Lists/Committees	Subscription Confirmation	
Meeting Proposal	Meeting Proposal Invite	
Meeting Proposal	Meeting Proposal Update	
Meeting Proposal	Meeting Proposal Final	
Meeting Proposal	Meeting Proposal All Responded	
Meeting Proposal	Meeting Proposal Suggestion to Host	
Meeting Proposal	Meeting Proposal Suggestion	
Notifications	Tell a Friend	
Web Content	Web Content Approved	
Notifications	Membership Switch to Monthly	{{Membership}} Switched To Mor

Auto Drop Members

- Auto Drop
 - If a member does not pay dues, system can automatically drop member and handle unpaid invoice
 - Configure specific Membership Types to automatically drop
 - Auto Drop Setup Guide
- Memberships Will Be Auto-Dropped report
 - Review memberships system set to automatically drop for accuracy

The screenshot shows the 'Setup' page in the Chambermaster Memberzone interface. A sidebar on the left contains a 'HIDE MENU' button and a list of navigation items: Events, Reports, Communication, Lists/Committees, Cloud, Sales Funnel, Marketing Automation, Projects/Tasks, Web Content, Store, Sponsors/Ads, Forms/Surveys, Chapters, Continuing Education, Fundraising, and Setup. The main content area is titled 'Setup' and features a red-bordered box labeled 'Auto Drop Setup Guide'. Below this box is a paragraph of instructions and a button labeled 'ENABLE AUTO DROPS'. A section titled 'Membership Types to Review' contains a table with columns for 'Membership Type', 'End Type', and 'Grace Period Days'. The table lists eight membership types, all with 'Manually Ended' as the end type and '30' as the grace period. A 'Need Help?' button is visible on the right side of the page.

Auto Drop Setup Guide

Use this guide to help you setup automatic drops for your memberships. Read and follow the suggestions under each section below. Check the box next to each section title when complete. When all sections have been completed, you'll be ready to Enable Auto Drops.

☒ ENABLE AUTO DROPS

☐ Membership Types to Review

First, identify which membership types you would like to have Automatically Expire. For the types that will Automatically Expire, consider if you would like those members to have a Grace Period between their membership's expiration date and their membership benefits ending. For example, setting a Grace Period of 14 would give a member two weeks after their membership's expiration to renew before ending their membership. We suggest using a Grace Period of at least 14 days.

Next, click on the name of each membership type you would like to Automatically Expire and set its End Type to Automatically Expires and, if desired, enter a Grace Period. Save your changes and repeat for any other membership types.

Membership Type	End Type	Grace Period Days
General Membership	Manually Ended	30
Small Business	Manually Ended	30
Nonprofit	Manually Ended	30
Corporate Membership	Manually Ended	30
Volunteer Membership	Manually Ended	30
Gold Membership Type	Manually Ended	30
Silver Membership	Manually Ended	30
Bronze Membership	Manually Ended	30

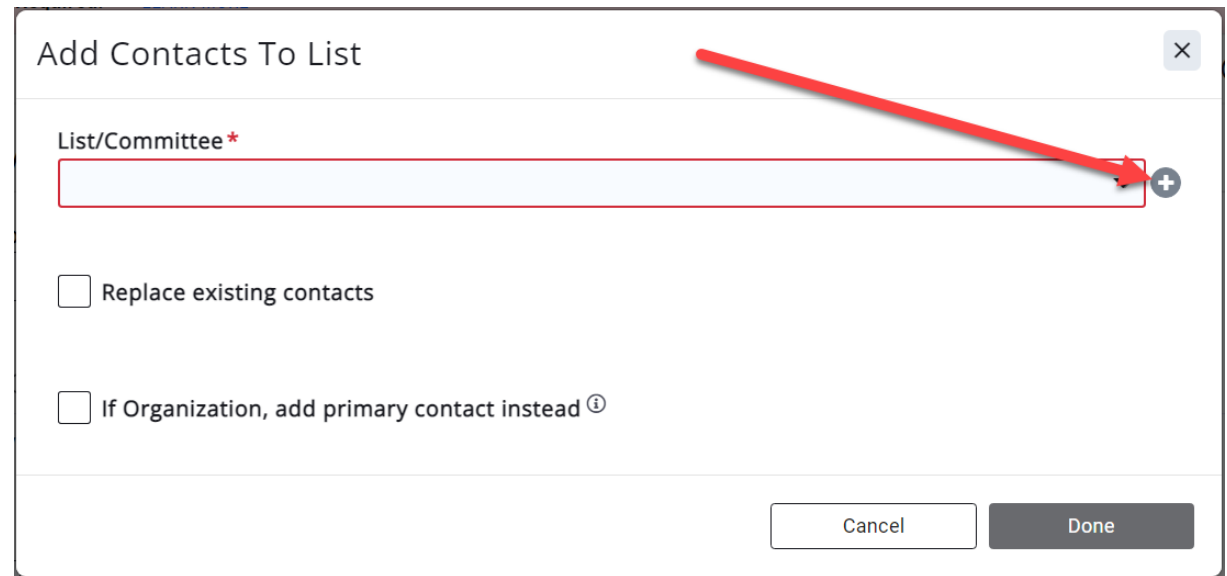
Automate Drip Campaigns

- Using Marketing Automation module
- Can send emails at just the right time
- Ongoing, relevant communications with members and prospects
- Reduce repetitive, manual tasks for staff
- Ex: New member onboarding, win-back campaign, member retention, etc.



Automatically Add Members to Lists

- Automated assignment to lists
 - Populate list from Membership Activation
 - Automatically add member to list when they join
- Ensure roster always up to date
- Responsive to data in your database
- Customizable
 - Add members based on your criteria
 - Tailor member experience



The screenshot shows a dialog box titled "Add Contacts To List" with a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "List/Committee *". A red arrow points to a plus sign icon at the end of this input field. Below the input field, there are two checkboxes: "Replace existing contacts" and "If Organization, add primary contact instead ⓘ". At the bottom right of the dialog, there are two buttons: "Cancel" and "Done".

Automatically Assign Projects

- Automated assignment of Projects
 - System automatically applies project template after trigger
 - Assigns tasks needed to successfully onboard new member to staff
 - Staff receive email notification when tasks assigned
- Provide more consistent experience for new members
- Ensure deadlines and costs defined for each step

Edit Project Template

< 2 of 2 >

×

Name*

New Member Onboarding

Project Type

Membership

Description

New Member Onboarding

Template Tasks

ADD TASK

Name	Task Priority	Task Type	Assigned To Person	Start Date	Due Date	Completed Date
None to display						

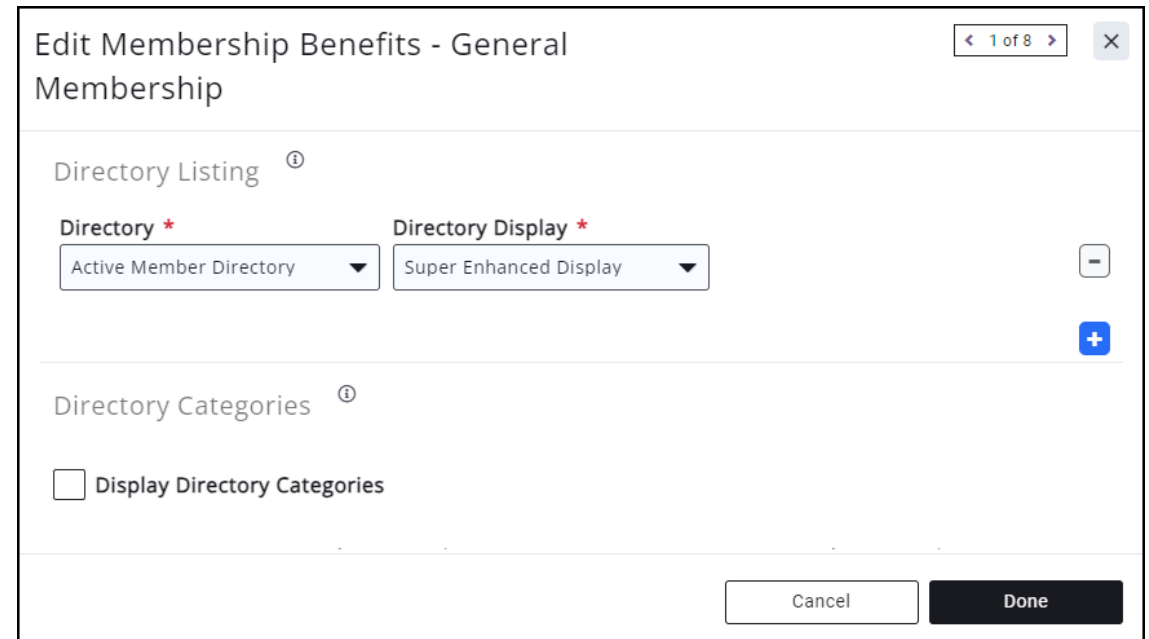
Delete

Cancel

Done

Automatically Assign Member to Directory

- Automated Assignment to a Directory
 - Automatically assign member to directory when they join
 - Choose what information displayed for each membership type
 - Ensure members receive benefits immediately



The screenshot shows a web form titled "Edit Membership Benefits - General" with a sub-header "Membership". The form is divided into sections. The "Directory Listing" section contains two dropdown menus: "Directory" (set to "Active Member Directory") and "Directory Display" (set to "Super Enhanced Display"). To the right of these dropdowns are minus and plus icons. Below this is the "Directory Categories" section, which includes a checkbox labeled "Display Directory Categories" that is currently unchecked. At the bottom right of the form are "Cancel" and "Done" buttons. A tab indicator at the top right shows "< 1 of 8 >".

Generate and Send Renewal Invoices

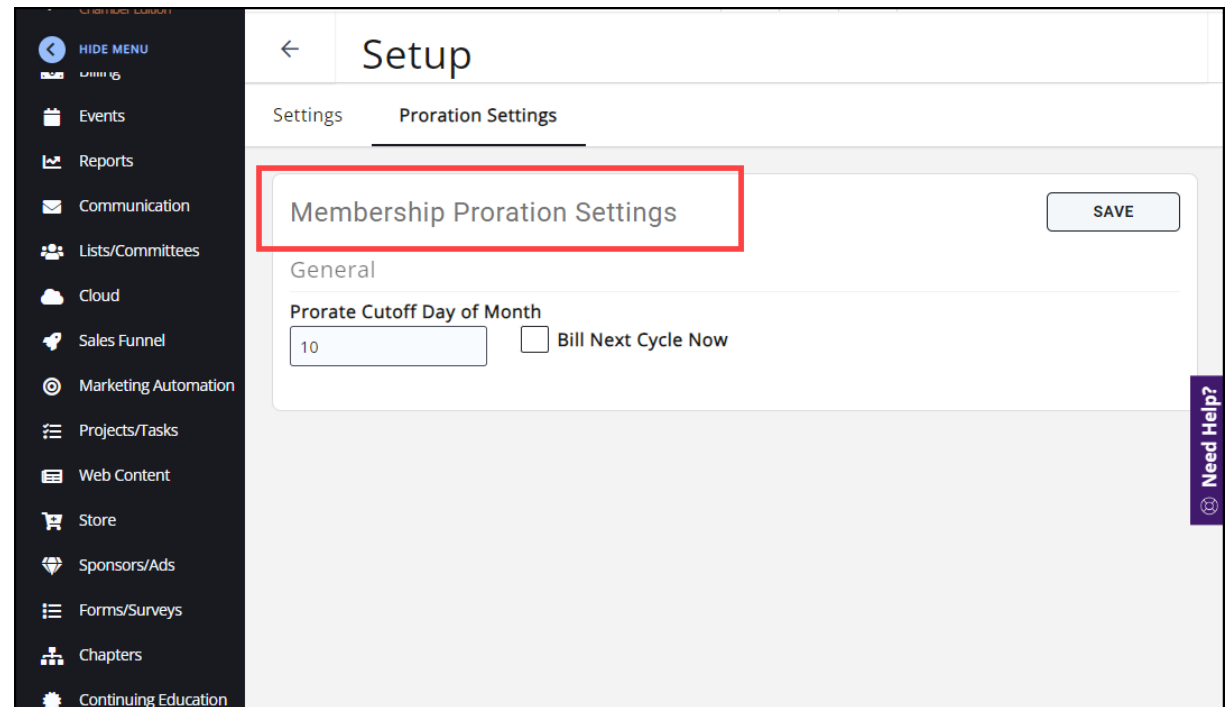
- Renewal invoices automatically generated and emailed to members
 - Credits can automatically be applied to renewal invoices
 - Create invoices to deliver before charging member
 - Allow system to automatically send out invoices via email using email template of your choice

The screenshot shows the 'Setup' page for 'Automated Scheduled Billing' in the Chambermaster Memberzone system. The left sidebar contains a menu with options: HIDE MENU, Lists/Committees, Cloud, Sales Funnel, Marketing Automation, Projects/Tasks, Web Content, Store, Sponsors/Ads, Forms/Surveys, Chapters, Continuing Education, Fundraising, and Setup. The main content area is titled 'Setup' and contains the following settings:

- Automated Scheduled Billing** (highlighted with a red box)
- Lead Time Days**: 1
- Months Back Allowed**: 4
- ☐ Use Automated Billing
- ☐ Auto-Apply Credits to Newly Created Invoices
- ☒ Invoice Before Autopayment
- Automatic Invoice Emails**
 - ☐ Enable Automatic Invoice Emails
- Email Template**: Invoice Email (dropdown menu)
- Track and record event invoices/payments under the:**
 - ☒ Individual
 - ☐ Business

Prorated Membership Dues

- Set up membership dues to be prorated based on date
 - Ex: Membership dues of \$1200 with renewal Jan. 1
 - New member joins July 1
 - System automatically adjusts fee to \$600



The screenshot shows the 'Setup' page in the Chambermaster Memberzone interface. The left sidebar contains a 'HIDE MENU' button and a list of navigation items: Events, Reports, Communication, Lists/Committees, Cloud, Sales Funnel, Marketing Automation, Projects/Tasks, Web Content, Store, Sponsors/Ads, Forms/Surveys, Chapters, and Continuing Education. The main content area is titled 'Setup' and has two tabs: 'Settings' and 'Proration Settings'. The 'Proration Settings' tab is active, and the 'Membership Proration Settings' section is highlighted with a red box. This section includes a 'SAVE' button and a 'General' subsection. Under 'General', there is a 'Prorate Cutoff Day of Month' field with the value '10' and a checkbox labeled 'Bill Next Cycle Now' which is currently unchecked. A vertical 'Need Help?' button is located on the right side of the page.

Variable Membership Dues Calculations

- Dues automatically calculated based on formula or levels
 - No need for fee schedule
- Pricing varies depending on factors
 - Number of employees, annual revenue, number of rooms in hotel, etc.
- Dues automatically recalculated for existing members and on your membership application

Edit Membership Billing - Builders Membership 1 of 7

Payment Gateway Invoice Template Payment Terms Terms/Conditions

☒ Formula Based Pricing

Recurring Fee Items ⓘ

Fee Item	Description	Price ⓘ	Annual Amount
Membership	Builder Membership	449	Billing Options
Enhanced Directory	Enhanced Directory Listing	39	Billing Options
Economic Development Fu	Economic Development Func	50	Billing Options

Select Multiple Memberships

- Allow new members to select multiple memberships during application process
 - Applicant can choose more than one membership on the membership application
- Example: Realtors selecting a NAR Membership and MLS Membership

Instructions

We are thrilled you are interested in joining the Kalamazoo Area Chamber! We invite you to make this valuable investment in your business and in this community. As a member of the chamber, your organization will enjoy a competitive advantage with opportunities for growth and learning, connections with government leadership, and an evolving program of pro-community and pro-business initiatives.

Select Your Option(s)

☐ **Small Business** \$100 Monthly + \$1,000.00 One-Time Fee + Price of Level Selected (Price Range: \$100 - \$167 Monthly)
Select Level
1-5 Employees: \$100 Monthly

☐ **Nonprofit** \$100 Annually + \$1,000.00 One-Time Fee + Price of Level Selected (Price Range: \$200 - \$500 Annually)
Select Level
Level One: \$200 Annually + \$1000 One-Time Registration ...

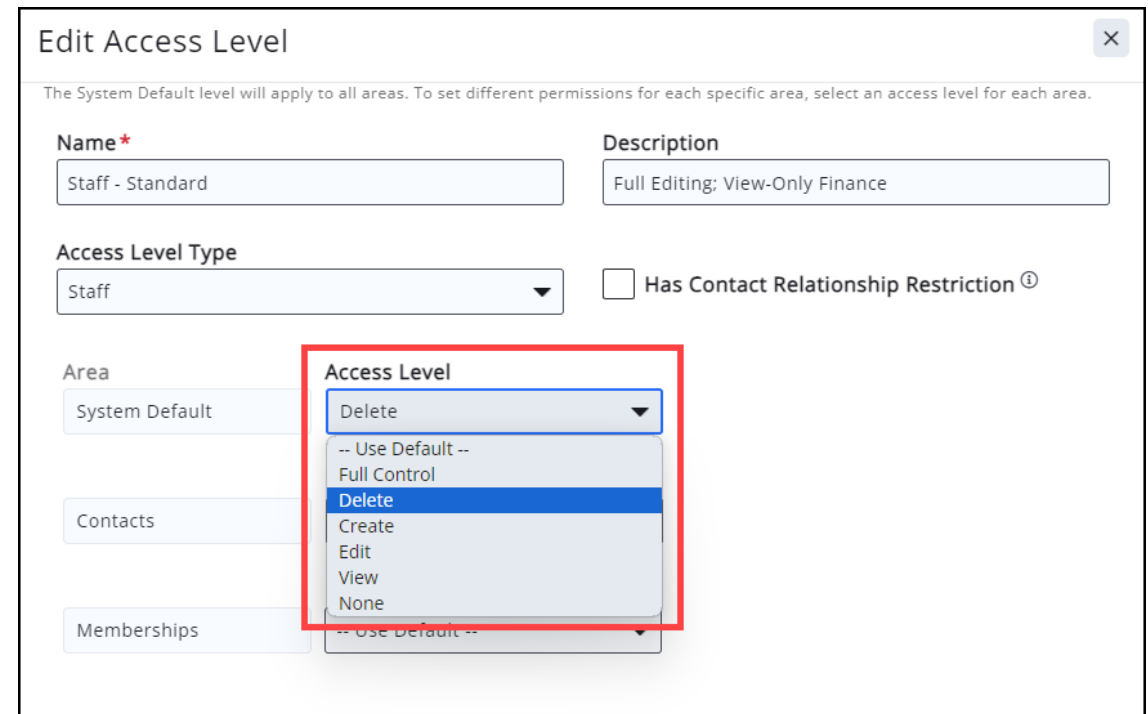
☐ **Volunteer Membership** Starting at \$100 Monthly + \$20.00 One-Time Fee

☐ **General Membership** \$100 Monthly + \$1,000.00 One-Time Fee
Our General Membership

☐ **Corporate Membership** \$416.67 Monthly + \$1,000.00 One-Time Fee

Custom Staff Access Levels

- Create unlimited number of staff access levels
 - Not limited to just 3 staff level as in CM
- Improved data security
- More options
 - Full control
 - Delete
 - Create
 - Edit
 - View
 - None



Edit Access Level

The System Default level will apply to all areas. To set different permissions for each specific area, select an access level for each area.

Name *
Staff - Standard

Description
Full Editing; View-Only Finance

Access Level Type
Staff

☐ Has Contact Relationship Restriction ⓘ

Area	Access Level
System Default	Delete
Contacts	-- Use Default --
Memberships	-- Use Default --

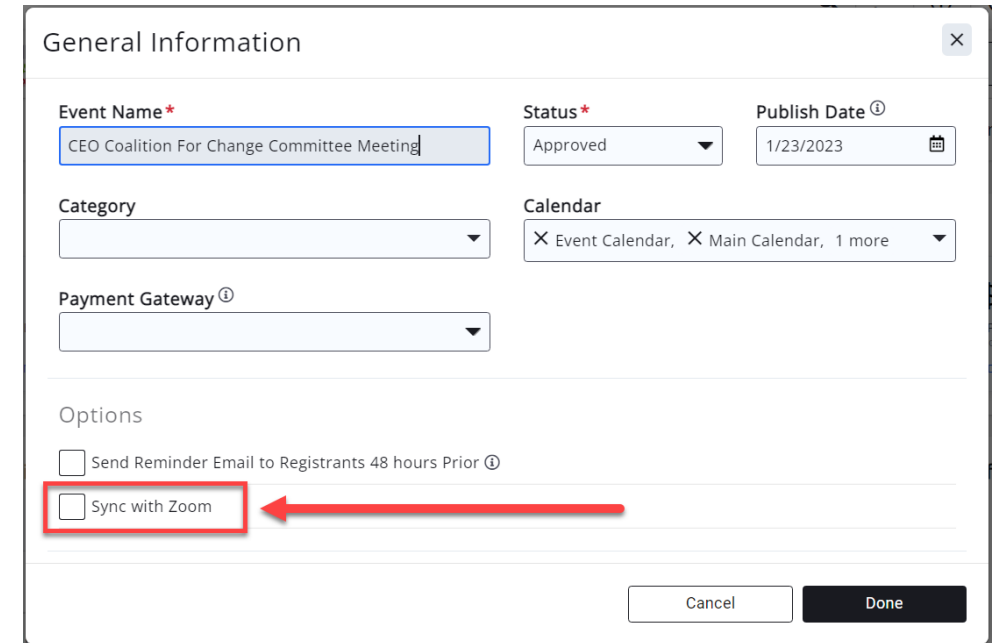
Customize Report Options

- Vast library of reports are all customizable
 - All reports provide the feature that you have in CM for Custom Member and Representative reports
- Select or remove Report Fields for each report
 - Streamline reports to be easier to read and understand

The screenshot shows the 'Membership Report' configuration page. At the top, there's a search bar and user information for 'Shelly Satre'. Below this, the report title 'Membership Report' is displayed with a 'RUN REPORT' button. The main section contains several dropdown menus for filtering: 'Membership Type', 'Level', 'Membership Status', 'Membership Category', 'Chapter', 'Start Month', 'Renewal Month', 'Fee Item', and 'Bill Frequency'. An 'Additional Criteria / Filters' section includes a dropdown for 'Drop Reason'. The 'Display Options' section features a 'Fields to Display' dropdown, which is highlighted with a red box. A red callout bubble points to this box with the text: 'Click anywhere in the Fields to Display box to expand the dropdown.' Below the dropdown, a list of available fields is shown, including 'All Items', 'Categories', 'NAICS', 'SIC', 'Contact', 'Account Number', 'Contact Membership Status', 'Contact Common Name', and 'Contact First Name'. The bottom of the list indicates '8 Selected'.

Video Conferencing Integration

- GoToWebinar
 - Create event in GrowthZone
 - Automatically create event in GoToWebinar
 - Attendees receive confirmation and login instructions from GoToWebinar
- Zoom
 - Connect
 - Sync meetings with Zoom during event setup
 - GrowthZone automatically creates event in Zoom



The screenshot shows a 'General Information' form with the following fields:

- Event Name ***: CEO Coalition For Change Committee Meeting
- Status ***: Approved
- Publish Date ⓘ**: 1/23/2023
- Category**: (empty dropdown)
- Calendar**: X Event Calendar, X Main Calendar, 1 more
- Payment Gateway ⓘ**: (empty dropdown)
- Options**:
 - ☐ Send Reminder Email to Registrants 48 hours Prior ⓘ
 - ☐ Sync with Zoom

The 'Sync with Zoom' checkbox is highlighted with a red box, and a red arrow points to it from the right. At the bottom right are 'Cancel' and 'Done' buttons.

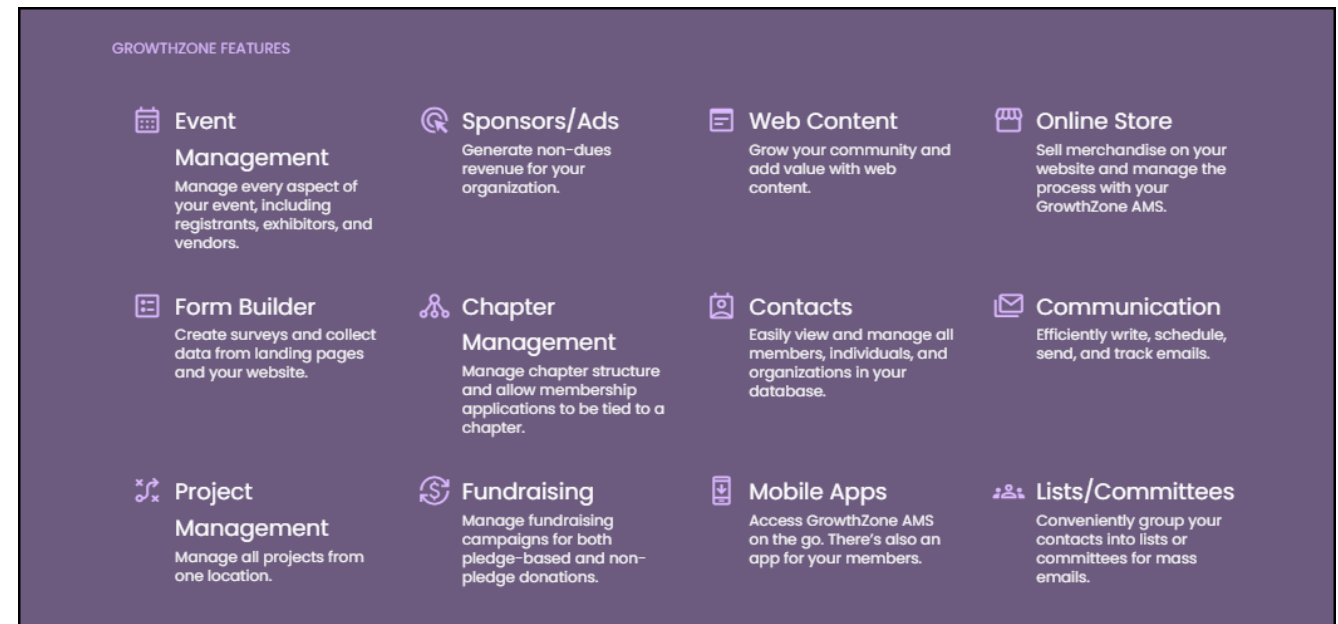
Single Sign-On (SSO) Integration

- Independent Insurance Agents & Brokers of America (IIABA)
- Clarity
 - Realtors
- FlexMLS
 - Realtors
- Voter Voice
 - Third-party advocacy and lobbying platform



GrowthZone is Modular

- GrowthZone Productivity Modules
 - Sales Funnel
 - Marketing Automation
 - Project/Tasks
 - Store
 - Chapters
 - Continuing Education
 - Fundraising
 - Benefit Tracking



Questions?

Contact our Account Management Team for a customized quote today!